



MaintenanceDirect User Manual  
**Technician Guidelines**

Version 2.0  
SchoolDude.com, Inc.

SchoolDude Support:  
Phone: 1-877-883-8337  
Email: [support@schooldude.com](mailto:support@schooldude.com)

## Technician Table of Contents:

Technician .....	1
I. Welcome to the Home Page! Now What? .....	1
II. My Account .....	4
III. New Work Order .....	6
IV. Searching for Work Orders .....	8
V. Editing Work Orders .....	14
VI. Entering Labor and Purchase Transactions .....	16
VII. My Requests .....	20
VIII. Closing Work Orders .....	21
IX. Using the Calendar .....	23

# Technician

## I. Welcome to the Home Page! Now What?

*(A quick overview of what's on the Home page.)*

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this, once work orders have been entered into the system and assigned to you:

The screenshot shows the MaintenanceDirect web application interface. At the top, there's a navigation bar with tabs: Home, Calendar, New Work Order, My Requests, and My Account. Below this is a search bar and a 'GO' button. The main content area is divided into several sections:


- Quick Launch:** A list of links including New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum, and SchoolDude.com site.
- LOGIN HERE:** A message saying 'Hello Howard Dude' and 'Not Howard Dude! Please be yourself.'
- ASSIGNED WORK:** A section for managing assigned work orders. It includes a note about saving actions, sorting options (Request Age, Ascending/Descending), and a filter dropdown. Below this, a specific work order is shown for 'Sloan Elementary School' with two lights out in the stairwell. It includes options to print, email the supervisor, or make a note. There are also buttons for 'Mark in Progress', 'Mark Complete', and 'New Request'.
- WORK ORDER COUNTS:** A section showing the number of work orders in progress and request totals. It includes a dropdown for 'Period' and a 'Request Totals' section showing '1 New Request'.
- WORK CENTER:** A section on the right side of the page containing a calendar, a weather link for 11/29/2005, and a summary of assigned work.

Across the top of the page, you will see that there are five tabs reading: “Home”, “Calendar”, “New Work Order”, “My Requests”, and “My Account”. Each of these tabs will be discussed in detail further on but for now, let's take a look at the Home page. It contains the following sections:

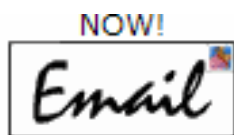
1. **Quick Launch:** This section provides commonly used links including, New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and SchoolDude.com site.

2. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “**yourself**” to log in correctly.
3. **ASSIGNED WORK**: In the center of the Home page near the top, you’ll find the Assigned Work section, where all work orders assigned to you will display. From this section, you can view, print, and sort your work orders, as well as make notes, email your supervisor, and mark work orders as “In Progress” or “Complete”. You can also record action taken, see how old a particular work order request is, and record the number of “Today’s Labor Hours”.
4. **WORK ORDER COUNTS**: The graph in this section shows the number of work orders assigned to you by status. To filter the graph by period, select the desired period from the dropdown box provided. The numbers next to each status are the number of work orders currently in that status. Click the **number** to view a list of all work orders in the status.
5. **WORK CENTER**: The Work Center provides links to the monthly calendar as well as today’s work. There is also a link to get today’s weather. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).
6. **Help** links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above your contact information. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word “**here**” (underlined and highlighted in red). See

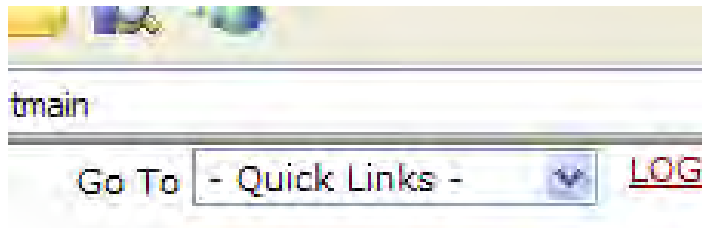
Click **here** to talk to  
an Online Operator  
**NOW!**



To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The email link looks like this:



7. **Quick Links** provides you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's Home page automatically. Quick links is located at the top of the Home page, near the right-hand corner, and looks like this:



8. **Did you know?** 📣: Just a bit of interesting trivia we thought we'd share each day, located at the very bottom of your Home page.


## II. My Account: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the My Account page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Your My Account page should look something like this:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



[Home](#) [Calendar](#) [New Work Order](#) [My Requests](#) [My Account](#)

Search for:

[Advanced Search](#) | [Help](#)

[TELL-A-FRIEND](#)

Legend: ☒ Indicates required information.  
☒ Account Administrator

Work Order Participant Information

Login Name

Hdude

☒

First Name

Howard

☒

Last Name

Dude

☒

Email

HDude@geewiz.com

☒

☒ Receive email notifications.

Reports To

Ben Dude

(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

Personnel Type

Not Assigned

Phone Number

919-555-1647

Fax

Pager

Pager Email

☐ Notify electronically by Pager?

(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

☐ Notify Pager Email only for Emergency Work Orders.

Cellular Phone

Cellular Email

☐ Notify electronically by Cellular Phone?

(Note: Cellular notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)


☐ Notify Cellular Email only for Emergency Work Orders.

Change Password

Old Password

New Password

Verify New Password

Powered by: 

[Home](#) [Calendar](#) [New Work Order](#) [My Requests](#) [My Account](#)


[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

[LOGIN](#) [SERVICES](#) [MY ACCOUNT \(32631335\)](#) [HELP](#)

Need help? Call us 1-877-868-DUDE (3833)

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[Click here to talk to an Online Operator NOW!](#)



- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click Done, you will be taken back to your **Home** page.




**SCHOOLDUDE SAYS:** If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section, don't worry. Next time you log in, you'll see that the change has been made.

### III. New Work Order: MD in Action.

Technicians have the ability to enter new work order requests in MaintenanceDirect. To do so, you will need to click on the **New Work Order** tab at the top of your Home page and fill out the following form on the New Work Request page. You can choose whether or not the new request will be assigned to you or if it will be routed according to your system routes. (Keep in mind that ☒ indicates a required field.)

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar **New Work Order** My Requests My Account

Search for:  GO

Advanced Search | Help

TELL-A-FRIEND

## New Work Request

**Welcome**  
To submit your request complete the following form.

☒ Indicates required information.

**Step 1 Location** ☒

-- Select Location --














**Building**  
-- Select Building --

**Area**  
-- Select Area --

**Area Number**

**Step 2 Select Problem Type:** ☒

Click [here](#) for Maintenance Emergency Contacts  
Click on the problem type below that best describes your issue.

 Athletic Fields	 Audio/Visual	 Cafeteria	 Carpentry
 Climate Control	 Custodial	 Electrical	 Food Services
 Heating/Ventilation /Air Conditioning	 Lighting	 Office Supplies	 Plumbing
 Windows			

☐ Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
Melissa Dude	919-555-9999

**Step 3 Please describe your problem or request.** ☒

**Step 4 Requested Completion Date**

**Step 5 Please provide contact information for follow-up questions and notifications.**

<b>First Name</b> <input checked="" type="checkbox"/> Howard	<b>Last Name</b> <input checked="" type="checkbox"/> Dude	<b>Email</b> <input checked="" type="checkbox"/> HDude@geewiz.com
<b>Phone</b> 919-555-1647	<b>Pager</b> <input type="text"/>	<b>Cellular Phone</b> <input type="text"/>

**Step 6 Will you perform this work?**  
☒ Yes ☐ No

**Step 7**

Home Calendar **New Work Order** My Requests My Account

Click here to talk to an Online Operator NOW!



- Enter your **Location**, Area, and Area/Room Number.
  - Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
  - **Describe** your problem or request.
  - Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
  - Your **Contact Information** (first and last name, email, phone, etc.) will automatically be entered into the fields in step 5.
  - If you will **Perform This Work**, click **Yes**. The work order will then be assigned to you. If you would like to submit this work as a new request to be routed to your maintenance department, click **No**.
  - Click **Submit**.
- You will be taken to the following page, which will show the work order request you just entered and the WOID (Work Order ID number) that it has been assigned.

The screenshot shows the Sloan County Schools Maintenance Direct website. The header includes the site name, navigation links (Home, Calendar, New Work Order, My Requests, My Account), a search bar, and user options (Logout, My Account, Help). The main content area features a 'Welcome' message, a 'Request Center' showing 1 Submitted Request, and a 'Your New Request ID 109' notification. A sidebar on the left offers 'Customer Service' with a phone number and a 'Tell-A-Friend' button. The footer contains copyright information, a 'Powered by: school dude .com' logo, and a 'Email' button.

## IV. Searching for Work Orders: Find the Information You Need.

As a Technician, even though you will receive only those work orders that are assigned to you, you have the ability to search for work orders within MaintenanceDirect, using several different methods. You will then be able to see the work order in a view-only format. We will look at each search method individually so you can choose the one that works best for you.

There are four ways to find a work order:

1. Assigned Work
2. Search Using the “Search for” Field
3. Advanced Search
4. Work Order Counts




**1. Assigned Work:** All open work orders assigned to you will appear in the Assigned Work section of the Home page, fifty at a time. You can sort the list using several fields provided in the “Sort by” drop-down box: WOID (Work Order ID number), Location, Request Age, Request Description, Priority Description, or Status Description. You can also search in ascending or descending order by clicking the green dot for the corresponding choice provided.

Here is a look at the Assigned Work section of the Home page:

The screenshot displays the MaintenanceDirect web application interface. The top navigation bar includes links for 'Calendar', 'New Work Order', 'My Requests', and 'My Account'. Below this is a search bar with a 'GO' button and a 'TELL-A-FRIEND' link. The main content area is titled 'ASSIGNED WORK' and includes a note: 'Note: Action Taken is saved when Mark Complete button is clicked.' It features a 'Sort by' dropdown set to 'Request Age', with 'Ascending' and 'Descending' radio buttons. A 'Filter' dropdown is set to '-- Select Status --'. Below this, it shows '1 - 1 of total 1 listed' with pagination links. The work order details for 'Sloan Elementary School' are displayed, including the description 'Two lights out in stairwell.', 'Request Age: 1 (in days)', and 'Assigned to: Howard Dude'. Action buttons include 'Print This!', 'Email Supervisor', 'Make a Note', 'Mark in Progress', 'Mark Complete', and 'New Request'. A 'Low Action Taken' status is shown. To the right, a 'WORK CENTER' sidebar contains a 'CALENDAR' section with '11/29/2005 WORK (Tuesd)' and 'Get Today's Weather', and sections for 'OTHER ASSIGNED WORK' and 'TOTAL ASSIGNED WORK'. At the bottom, a 'WORK ORDER COUNTS' section shows a 'Period' dropdown set to 'All' and a 'Request Totals' section with '1 New Request'.

## More About “Assigned Work”...

Take note that in this section, as well as searching for work orders, you also have the options of taking several different actions:

- ✓ View the details of a work order or edit it (editing work orders will be discussed in further detail in the next chapter of this manual).
- ✓ Print the work order form, using the “Print This” icon provided (  **Print This!** ).
- ✓ Email your supervisor (or other users in the system) by clicking on the Email Supervisor icon provided (  **Email Supervisor** ).
- ✓ Add a journal note to a work order by clicking on the “Make A Note” icon (  **Make a Note** ).
- ✓ Enter the action taken on a work order using the Action Taken field.
- ✓ Enter “Today’s Labor Hours” in the field provided



**SCHOODUDE SAYS:** To save Action Taken and Today’s Labor Hours, you must click the **Mark Complete** button. Doing this will change the status of the work order to “Complete” and will remove it from the list of open assigned work orders.

**2. Search Using the “Search for” Field:** This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:

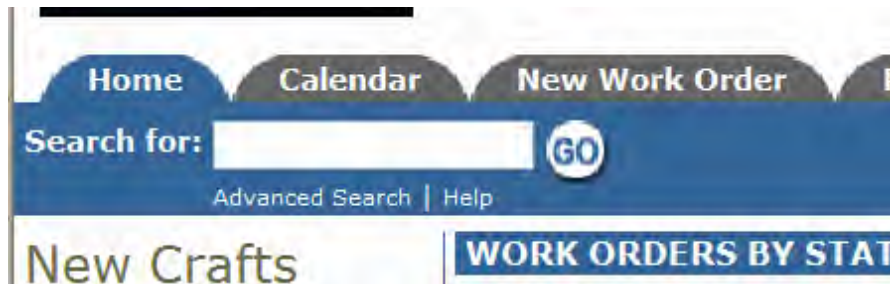


The screenshot shows the top navigation bar of the SchoolDude.com website. It includes links for Home, Calendar, New Work Order, My Requests, and My Account. Below these is a search bar with the text "Search for:" followed by a text input field and a "GO" button. A red arrow points to the "GO" button. Below the search bar is a "Quick Launch" section with links to New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum, and SchoolDude.com site. To the right of the search bar is the "ASSIGNED WORK" section, which includes a note, a "Sort by" dropdown menu set to "Request Age", a "Filter" dropdown menu set to "-- Select Status --", and radio buttons for "Ascending" and "Descending". At the bottom of the "ASSIGNED WORK" section, it says "1 - 1 of total 1 listed" and "First Prev 50 Next 50 Last".

In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type “180” into the search box and click **Go**. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

3. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”.




- Clicking on this link will take you to the Work Order Search page, which will look something like this:

- On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.

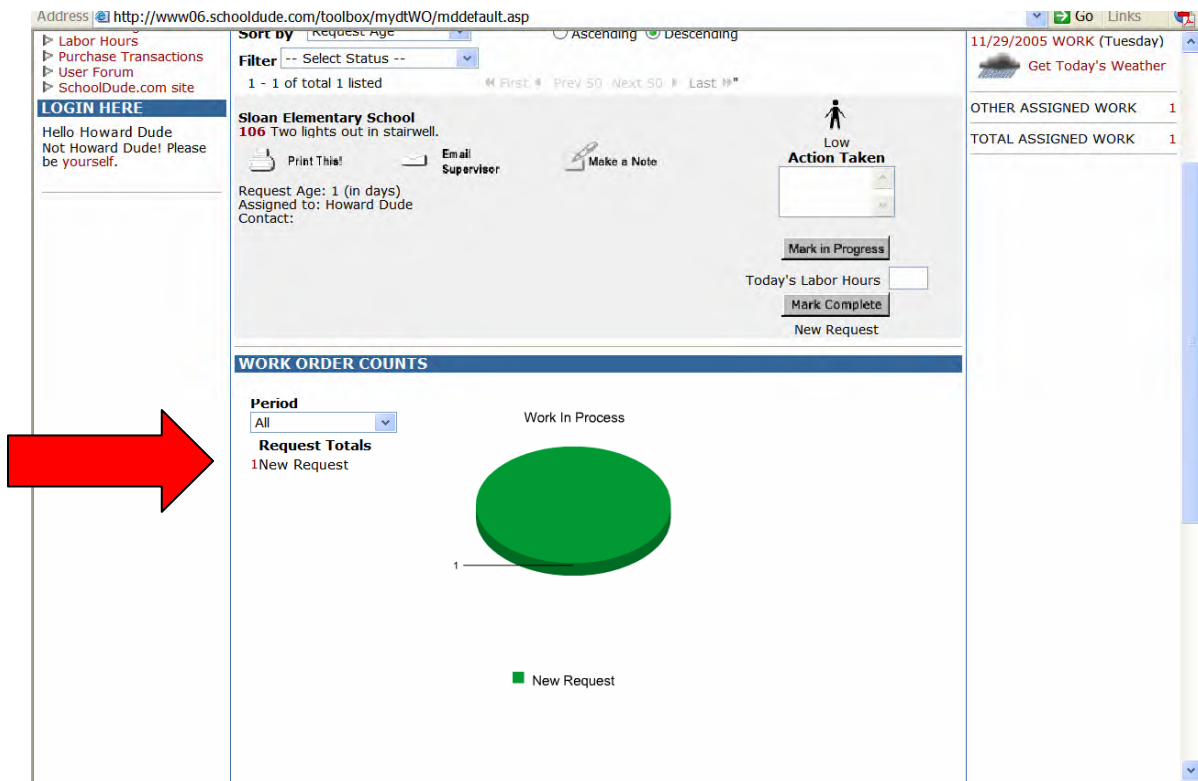


**SCHOOLDUDE SAYS:** An example of using the Advanced Search would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to “9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon () next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).

**4. Work Order Counts:** You can view all of your work orders that hold a particular status by clicking on the number next to the corresponding status. You can edit the time period that is displayed in this section by selecting a new period from the dropdown box provided. Once you select a period, the page will automatically refresh, showing that period.

See the Work Order Counts section of the Home page below:



- As work orders are assigned to you and their statuses change as you handle them, you will see more statuses listed in this section (marked by the red arrow above) and more colored sections will appear in the pie chart.



## V. Editing Work Orders: Adding Your “Two-Cents”!

Technicians have the ability to edit work orders entered into the system. However, this ability is limited in certain aspects. As a technician, for example, you can add information and details to a work order that you have done work on yourself, but you can't reassign a work order to another user.

To understand the work order itself in order to understand how to edit one, let's take a detailed look at the work order form and just what you can do, as a Technician, to edit it. See below:

The screenshot shows the Sloan County Schools Maintenance Direct web application. The address bar displays <http://www06.schoolsde.com/toolbox/mydtWO/mddefault.asp>. The page features a navigation bar with links: Home, Calendar, New Work Order, My Requests, and My Account. A search bar is located below the navigation bar. The main content area is divided into three columns. The left column, titled 'Quick Launch', contains links: New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum, and SchoolDude.com. The middle column, titled 'ASSIGNED WORK', displays a list of work orders. The first work order is for 'Sloan Elementary School' with ID '106' (highlighted in red in the original image). The description is 'Two lights out in stairwell.' Below the description are links for 'Print This!', 'Email Supervisor', and 'Make a Note'. The status is 'Low Action Taken'. The right column, titled 'WORK CENTER', contains a 'CALENDAR' section with '11/29/2005 WORK (Tuesday)' and 'Get Today's Weather'. Below the calendar is a table showing 'OTHER ASSIGNED WORK' and 'TOTAL ASSIGNED WORK' with counts of 1. At the bottom of the page is a 'WORK ORDER COUNTS' section with a 'Period' dropdown set to 'All' and a 'Request Totals' table showing '1 New Request'.

- To view a work order in detail, click on the **WOID** (Work Order ID number), shown in red. The example above is marked with the red arrow.
- Once you click on the WOID, you will go directly to the work order itself. See example on the next page:



Address: [http://www06.schoolsde.com/toolbox/mydtwo/mydtwo\\_s/mydtwo\\_WOUupdate\\_tech.asp?woid=106&sql=&strnext=&strprev=&strfirst=8](http://www06.schoolsde.com/toolbox/mydtwo/mydtwo_s/mydtwo_WOUupdate_tech.asp?woid=106&sql=&strnext=&strprev=&strfirst=8) Go Links

Sloan County Schools

Go to: Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for:  GO

Advanced Search | Help

### Work Order Shortcuts

Talk About It *	Suppliers *	New	Request Info	Contact Info	Submit My
Assignment Info	Budget Info	Deferral	Action Taken	Messages	Journal Notes
Transactions	Approval Routing	Attach File	Print Form	Print Details	PM Schedule

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: ☒ Indicates required information.  
☒ Automatically saves on click.

Quick Links  
- Completed Work  
- Work in Progress

### Work Order: 106

Save Reset First Prev Next Last

Status ☒ New Request  
Priority ☒ Low

Status Date: 11/28/2005 1:01:49 PM  
Created By: BenDude

#### Request Info

Request Date ☒ 11/28/2005  
Request Description ☒ Two lights out in stairwell.

The work order form contains the following fields as you scroll down the page (fields that you can edit are marked in red and include a description of what can be done):

- **Status:** you can change the status that a work order holds, based on what's been done.
- **Priority:** you can choose the priority of a work order (low, medium, high, emergency, safety, and scheduled).
- Status Date, Created By, and Date Created
- Request Information
- Contact Information
- **Assignment Information:** You can enter the **Actual Completion Date** in this section.
- Deferral Information
- **Budget information:** The **Purpose** of the request is displayed in a dropdown box. If it is incorrect, you can select a new purpose. The purpose is generally "why"

you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose could be “vandalism”. **Craft**, **Custom Category**, **Project**, and **Equipment** can also be selected in their corresponding fields.

- **Action Taken**: Enter the action taken for the work order. The requester will see this information.
- **Message Center**: This section allows you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the **New Message** link.
- **Journal Notes**: This section allows you to post journal notes regarding the work order. You also have the option here of sending out a reminder email for the journal note. To create a new journal note, click the **New Note** link.
- **Transactions**: In this section, you can add and edit Labor and Purchase Transactions. If you have SchoolDude’s InventoryDirect, you will also be able to add and edit Issue Transactions here. Transactions will be discussed in further detail in the next section of this manual.
- Approval Routing
- **File Attachments**: You can attach up to **TWO** files for each work order. They must be 3MB or less each.

## VI. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes, of course, from the labor and purchase transactions attached to it. To track those costs, simply enter them into MaintenanceDirect and our system will organize them for you so that you'll always know exactly how much a work order costs and why.

- To get started with entering labor and purchase transactions, do the following:
- As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:



- Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:

**Sloan County Schools** Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for:  GO

Legend: ☒ Indicates required information.

**Purchases** Back to WOID 106

Work Order: 106

Search WOID  Search

<b>Description</b>	Two lights out in stairwell.
<b>Location</b>	Sloan Elementary School
<b>Status</b>	New Request
<b>Assigned To</b>	Howard Dude

☒ **Trns Date** 11/29/2005

☒ **Type** Materials

Select Supplier or type new one below.  Select Supplier

**Supplier**

**Invoice/PO #**

**Budget Code** -- Select Budget Account --

**Purchased by** -- Select Purchaser --

☒ **Description**

☒ **Quantity**

☒ **Cost Each**  % Markup  % Discount

☒ Required information fields include Transaction Date, Type, Description, Quantity, and Cost Each.

- Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:

The screenshot displays the 'Sloan County Schools Maintenance Direct' web application. The page title is 'Sloan County Schools'. The navigation bar includes links for Home, Calendar, New Work Order, My Requests, and My Account. A search bar is present with a 'GO' button. The main content area is titled 'Back to WO 106'. It features a date selector for November 2005, a calendar, and a table for entering labor transactions. The table has columns for Work Order ID/Location, Action Taken, and days of the week (Sat, Sun, Mon, Tue, Wed, Thu, Fri) with sub-columns for hours and overtime (OT). The table shows data for '106 Sloan Elementary School'. Below the table, there are fields for 'Total Hours' and 'Grand Total Hours', along with 'Save' and 'Reset' buttons. The footer includes a 'Powered by: School Dude .com' logo, a 'Print This!' button, and a 'Back to WO 106' link. The footer also contains a 'Click here to talk to an Online Operator NOW!' link, an 'Email' button, and a copyright notice: 'Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff'.

Work Order ID/Location	Action Taken	Sat Nov 26	Sun Nov 27	Mon Nov 28	Tue Nov 29	Wed Nov 30	Thu Dec 1	Fri Dec 2	Total Hours
106 Sloan Elementary School		0	OT 0	0	OT 0	0	OT 0	0	0

- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT (“Other Time”) next to the corresponding date. A window will appear for you to enter in any other times.
- Click **Save** when you’re done.

You may also use the Quick Launch section of the Home page (shown on the next page) to pull up labor sheets for all your assigned work orders:

Sloan County Schools

Go to

Quick Links

LOGOUT

MY ACCOUNT (32631335)

HELP

Home

Calendar

New Work Order

My Requests

My Account

Search for:

GO

Advanced Search | Help

TELL-A-FRIEND

Quick Launch

New Request

Your Settings

Labor Hours

Purchase Transactions

Equipment Usage

User Forum

SchoolDude.com site

LOGIN HERE

Hello Howard Dude

Not Howard Dude? Please be yourself.

ASSIGNED WORK

Note: Action Taken is saved when Mark Complete button is clicked.

Sort by

Request Age

Ascending

Descending

Filter

-- Select Status --

1 - 2 of total 2 listed

First Prev 50 Next 50 Last

Sloan Elementary School

106 Two lights out in stairwell.

Print This!

Email Supervisor

Make a Note

Request Age: 78 (in days)

Assigned to: Howard Dude

Contact:

Low

Action Taken

Mark in Progress

Today's Labor Hours

Mark Complete

New Request

Sloan Community College

Area: 2nd Floor

109 Thermostat needs repair.

Print This!

Email Supervisor

Make a Note

Request Age: 76 (in days)

Assigned to: Howard Dude

Contact: Howard Dude

Phone: 919-555-1647. Pager:

Medium

Action Taken

Mark in Progress

WORK CENTER

CALENDAR

2/14/2006 WORK (Tuesday)

Get Today's Weather

OTHER ASSIGNED WORK

2

TOTAL ASSIGNED WORK

2

19



## VII. **My Requests**: Keeping Track of Your Requests.

The **My Requests** page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the **My Requests** page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for: GO

Advanced Search | Help

Legend: Click [icon] to sort table by that column.

My Requests

+ Add New Work Order

1 - 1 of total 1 listed

Previous 10 Next 10

Status [icon]	Location [icon]	Action Taken [icon]	Complete Date [icon]
Area [icon]	Description [icon]	Request Date [icon]	
Area Number [icon]		Type [icon]	
New Request 2nd Floor	Sloan Community College 109 Thermostat needs repair.	No Action Note 11/30/2005 Climate Control	

+ Add New Work Order

Previous 10 Next 10

Print This!

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Home Calendar New Work Order My Requests My Account

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- Each request you make will be added to this list, where you can check its current status, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the **Print This!** icon near the bottom of the page ( **Print This!** ).
- Add a new work order by clicking the **+Add New Work Order** icon provided at the top right-hand corner of the My Requests list. You will then be taken to the New Work Request page.

## VIII. Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. “Complete” work orders can be designated when you enter your labor hours from the Home page. To mark a work order as a “Closed Work Order”, you will have to open the “long form” of the work order so you can change the status box. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



**SCHOOLDUDE SAYS:** Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

**Work Order: 101**

<< First   < Prev   Next >   Last >>

**Status** ☒

Complete

▼

**Status Date**  
11/14/2005 1:18:07 PM

**Status Last Changed By**

## Work Order: 101

Save

Reset

◀◀ First ◀ Prev Next ▶ Last ▶▶

**Status** ☒

Closed Work Orders ▼

**Status Date**

11/14/2005 1:18:07 PM

**Status Last Changed By**



## IX. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a **Calendar** tab—a place you can go to see what’s going on, where, when, and who’s involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we’ll show you how to use the calendar and all of its options to keep you up to speed on your work load.

- To open up your calendar from wherever you are, click on the **Calendar** tab at the top of your screen.

The page that opens up will look something like this:

The screenshot shows the MaintenanceDirect web application interface. At the top, there's a header for "Sloan County Schools" with navigation tabs: Home, Calendar, New Work Order, My Requests, and My Account. A search bar and a "GO" button are also present. Below the header, there's a "Calendar Shortcuts" section with buttons for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. The main content area displays the "Work Calendar for November 2005". It includes a table with days of the week and dates, showing various work orders and events. For example, November 15 is marked as "Matt's Birthday" and November 28 is marked as "Teacher Work Day (November)". A legend at the bottom explains the icons used for different types of work orders: MD Work Order (no icon), PM Work Order, FSD Work Order, and IT Work Order.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15 Matt's Birthday	16	17	18	19
20	21	22	23	24	25	26
27	28 Teacher Work Day (November) 106	29 Get Weather	30			

<- Previous Month      Next Month - >

**Legend**

- MD Work Order (no icon)
- PM Work Order
- FSD Work Order
- IT Work Order

At the top of your screen, just above the words “Work Calendar for...”, are the Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. In this section, we’ll cover each of these shortcuts in turn, starting with the Month View.

1. The **Month View** page shows you what’s going on, on a large, easy-to-read calendar, one month at a time. It’s the view that shows automatically when you open up the Calendar page—in other words, the page you’re looking at now.

The month you’re in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.





- On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders assigned to you. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.
- There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

			Get weather			
20	21	22	23	24	25	26
27	28	29	30			

<- Previous Month Next Month - >

---

**Legend**

- MD Work Order (no icon)
-  PM Work Order
-  FSD Work Order
-  IT Work Order
-  PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

---

[Home](#)
[Calendar](#)
[New Work Order](#)
[Reports](#)
[Services](#)
[Account Setup](#)

Click here to go Online!

- Work order numbers will be displayed on the calendar as red links. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the “Estimated Hours” for that work order.
- If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number** of the date on the monthly calendar, if that day's number is shown in **red** (you can only reach the Day View this way if you have work orders assigned to you on that particular day).

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. If you have no work orders assigned for a particular day, the words "There are no assigned Work Orders for this day" will be shown. If you do have work orders, however, you will see your work orders for the day displayed on the left-hand side, along with the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See red arrow below:

The screenshot shows the Sloan County Schools Maintenance Direct website. The top navigation bar includes links for Home, Calendar, New Work Order, My Requests, and My Account. A search bar is present with a 'GO' button. Below the navigation bar, there are 'Calendar Shortcuts' for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. A 'Filtering' section allows viewing work orders by location (0-9, A-Z, ALL). The main content area displays 'Work Orders for Monday 11/28/2005' with a small calendar on the right. A red arrow points to the work order details for WOID 106, assigned to Howard Dude, with a request for 'Two lights out in stairwell.' at Sloan Elementary School. A green arrow points to the small calendar on the right, which shows the month of November 2005 with the 28th highlighted in red.

**Sloan County Schools** Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

**Calendar Shortcuts**

Month View Day View Organization Event Calendar Assignment Report Get Weather

**Filtering**

View work orders starting by location:

0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

**Work Orders for Monday 11/28/2005**

1 - 1 of total 1 listed Previous 10 Next 10

**Assigned To** Howard Dude

**WOID** 106

**WO Request Description** Two lights out in stairwell.

**Location Name** Sloan Elementary School

**Estimated Hours** 0

Print This!

November 2005

S M T W T F S

30 31 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 1 2 3

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- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see next page).

◀ November 2005 ▶						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

- To print a form for a work order, click on the **Print This** button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The **Organization Event Calendar** page should look something like this, depending on how many events have been entered to this point:

**Sloan County Schools** Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for: GO

Calendar Shortcuts

Month View Day View Organization Event Calendar Assignment Report Get Weather

Location -- Select Location --

2005 Sloan County Schools Organization Event Calendar

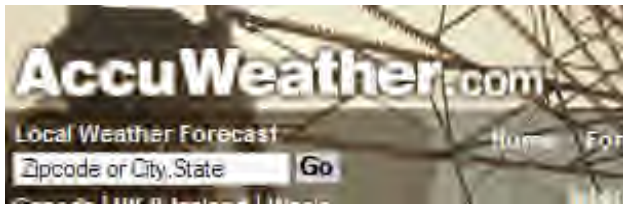
All locations Show Only Shared Events

1 - 6 of total 6 listed Previous 30 Next 30

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.